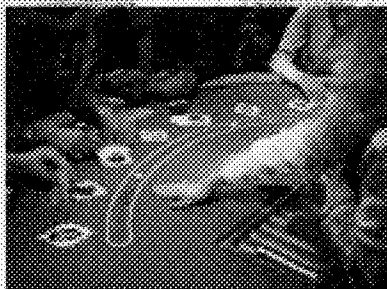
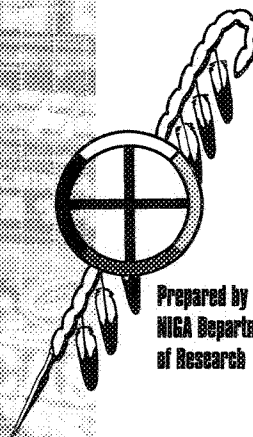
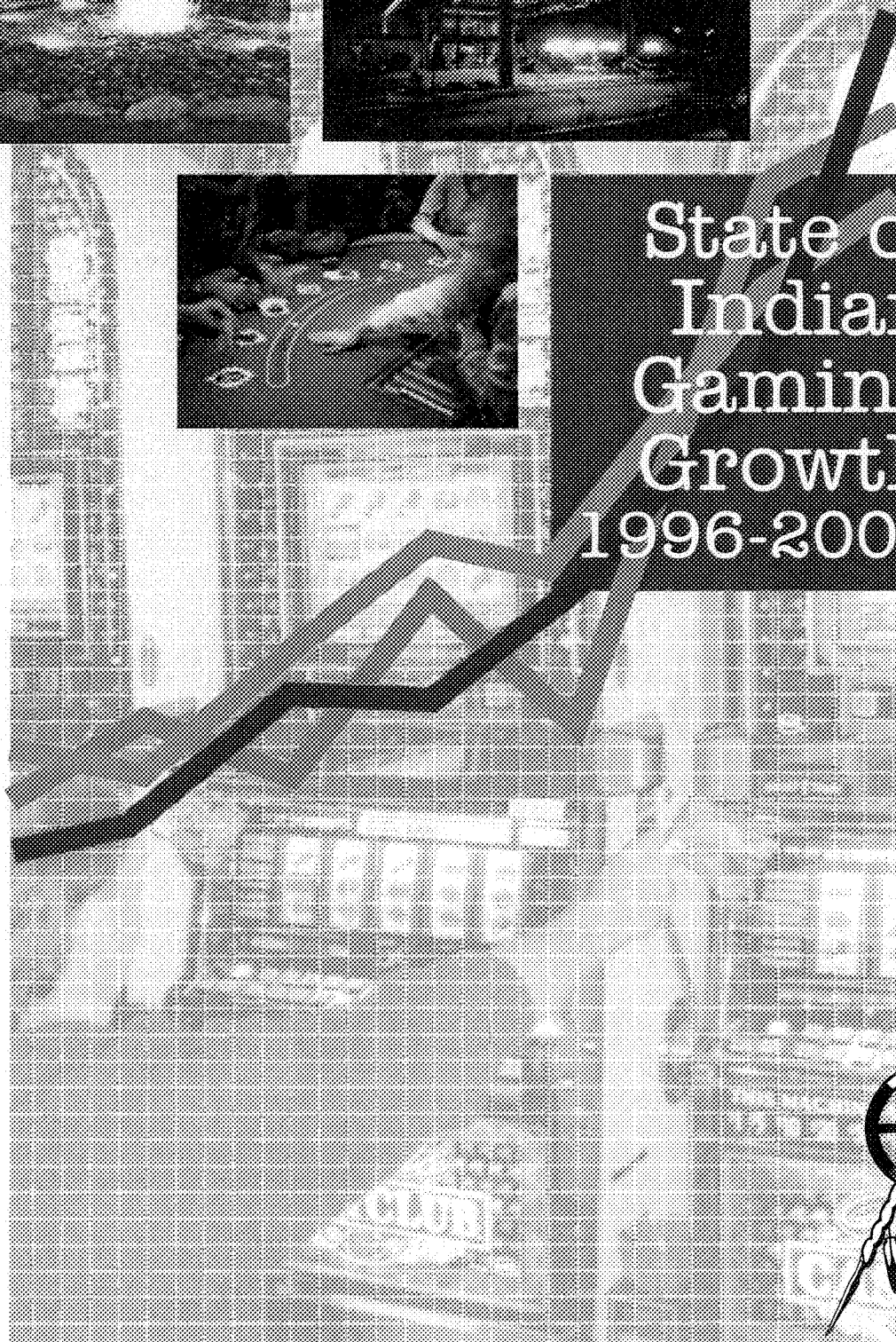


Appendix H:
Charts of U.S. and Indian Gaming Industry

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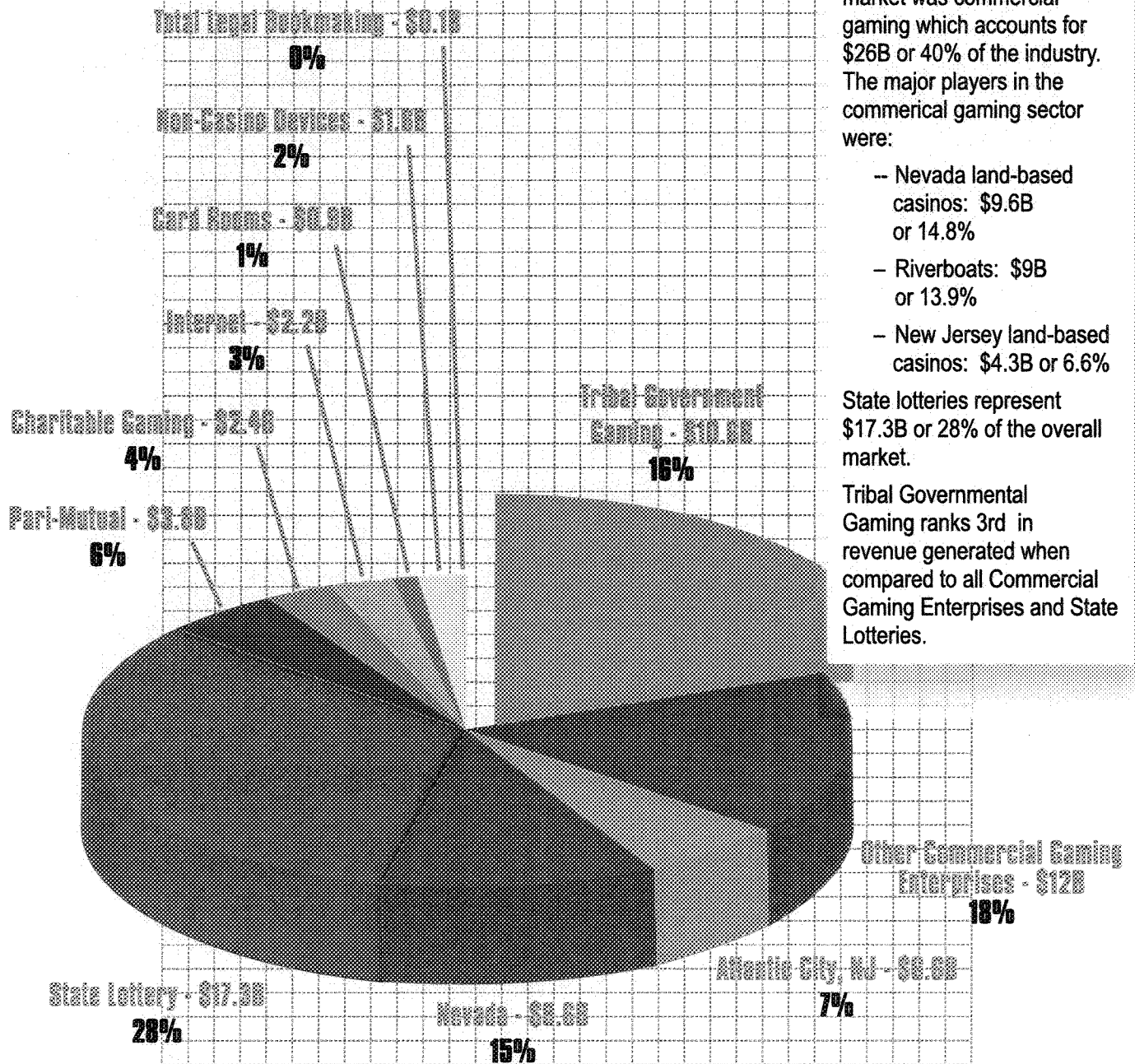
State of Indian Gaming Growth 1996-2000



Prepared by
NIGA Department
of Research

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Size of Gaming Industry in 2000 (\$/Billions)



The size of the US Gaming Industry in 2000 was \$64.9B. Indian gaming represents \$10.6B or 16% of the market. The overall leader in this market was commercial gaming which accounts for \$26B or 40% of the industry. The major players in the commercial gaming sector were:

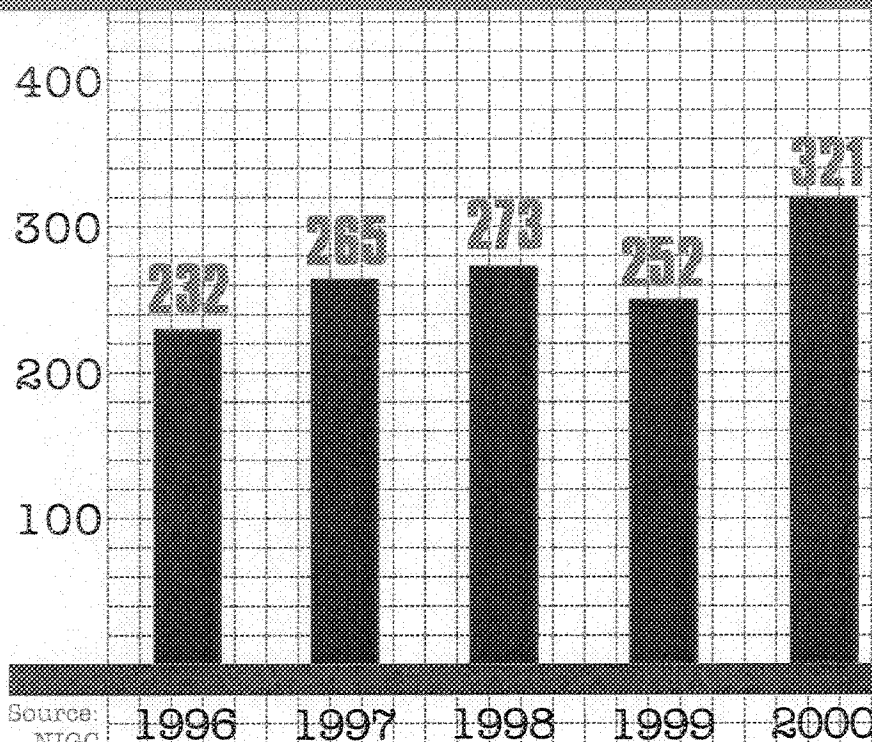
- Nevada land-based casinos: \$9.6B or 14.8%
- Riverboats: \$9B or 13.9%
- New Jersey land-based casinos: \$4.3B or 6.6%

State lotteries represent \$17.3B or 28% of the overall market.

Tribal Governmental Gaming ranks 3rd in revenue generated when compared to all Commercial Gaming Enterprises and State Lotteries.

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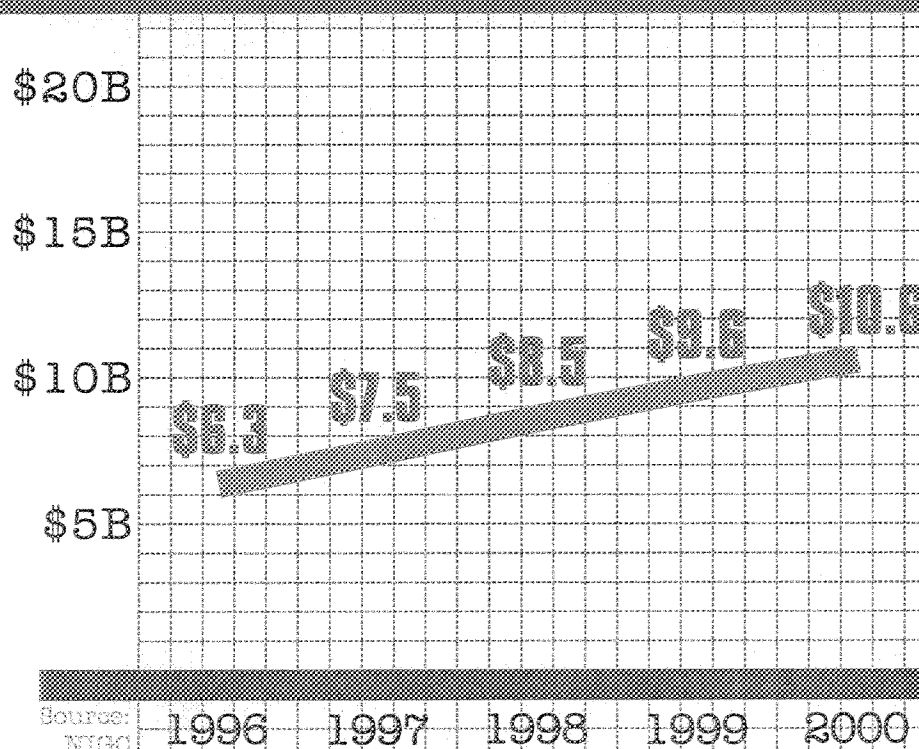
1996-2000 Number of Indian Gaming Operations



According to the National Indian Gaming Commission, there were a total of 321 Indian gaming facilities conducting either or both Class II and Class III in 2000. These Tribes conduct their gaming operations in 29 states. Tribes in Oklahoma, California, Washington, Wisconsin and Montana account for 178 gaming establishments or 55.5% of the total.

Source:
NIGC

1996-2000 Revenues for Indian Gaming Operations (\$/Billions)



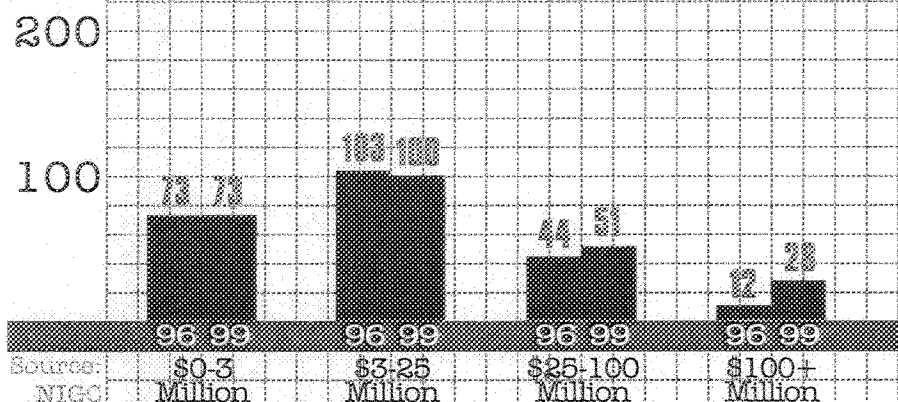
According to aggregate revenue information provided in the Biennial Report of the National Indian Gaming Commission, Indian gaming revenues have grown 68.2% since 1996.

The compound annual growth rate (CAGR) from 1996 to 2000 has been 13.9%. Year-to-year growth has been 18.3% for 1997, 13.9% and 13.3% for years ending 1998 and 1999. In 2000 the growth was 10.2%.

Source:
NIGC

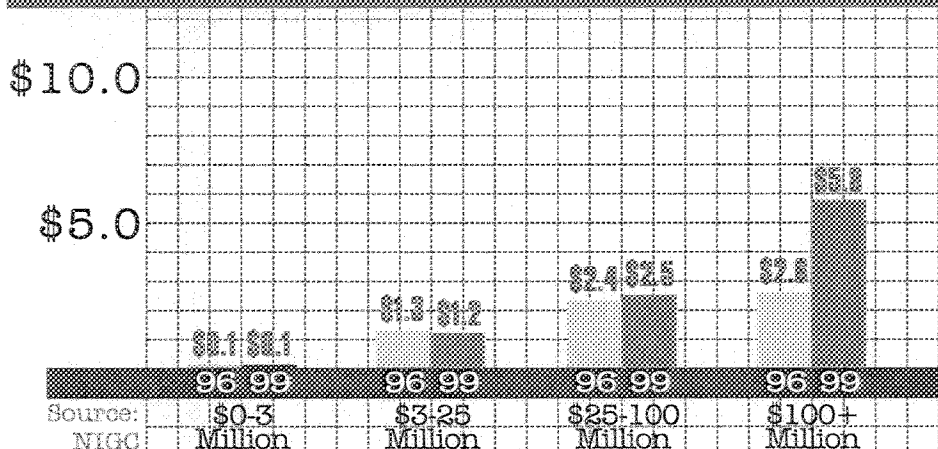
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1999* vs 1996 - Casino Operations Growth By Major Category (\$/Billions)



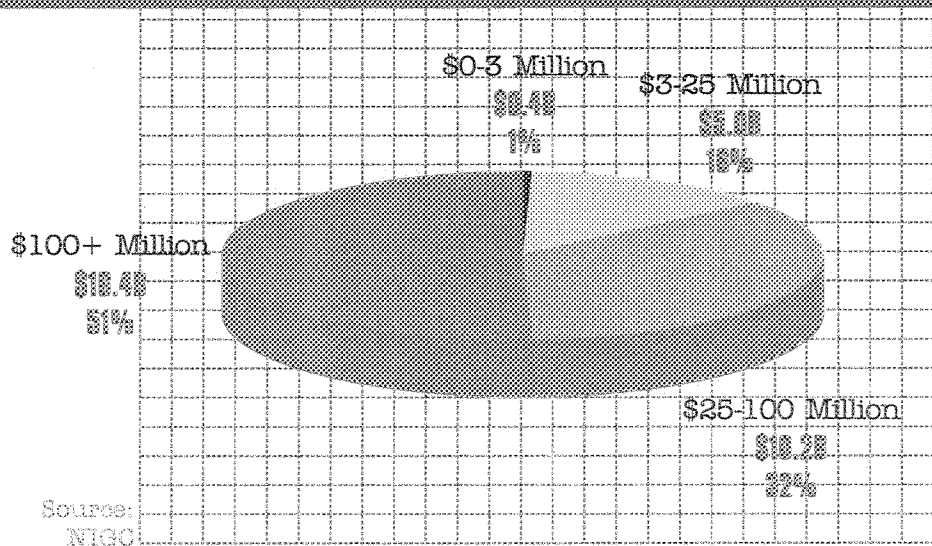
In 1999 the total number of Indian gaming facilities has grown from 232 to 252. This represents a growth of 8.6%. The \$100 Million + category grew from 12 operations to 28, which represents a 133.3% overall growth.

1999* vs 1996 - Casino Revenue Growth By Major Category (\$/Billions)



In 1999 the total revenues generated by Indian gaming operations grew from \$6.3 Billion to \$9.6 Billion. This represents a total growth of 52.6%. The \$100 Million + category grew from \$2.6 Billion to \$5.8 Billion, which accounts for a 123% overall revenue increase.

1999* vs 1996 - Total All Indian Gaming Revenues By Major Category



The grand total of all Indian gaming revenues generated by all operations from 1996 to 1999 was \$31.9 Billion. The \$100 Million + category took in \$16.4 Billion or 51% of the revenues over the past four years. The remaining categories took in \$15.5 Billion over the same period. The \$100 Million + category ended 1999 with 28 gaming establishments while the remaining categories ended the year with 224 or 89% of all Indian gaming operations.

* NOTE: 2000 data not available by Major Category

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